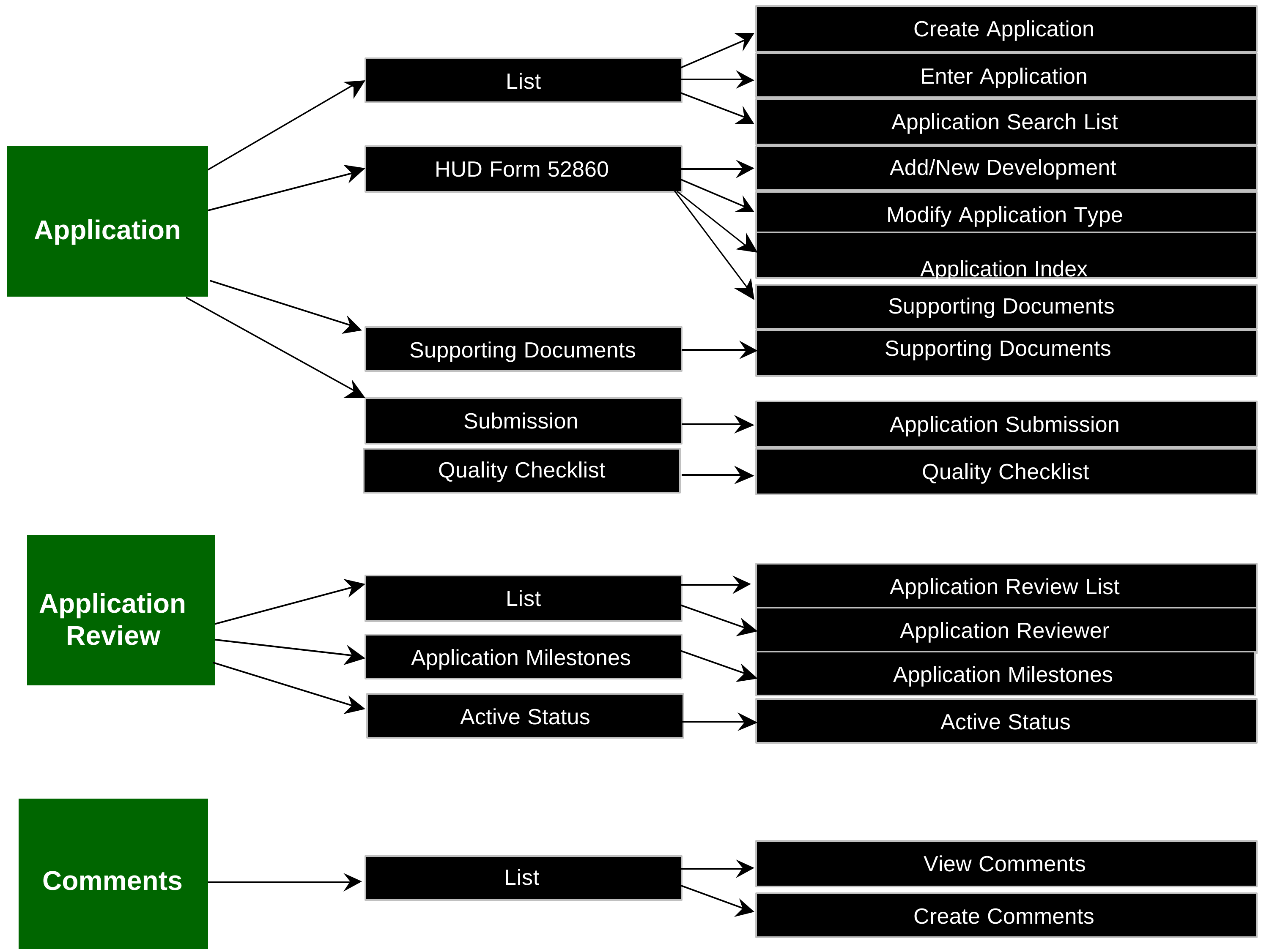
Office of Public and Indian Housing

PIH Information Center

Job Aids

Demolition/Disposition Sub-module Job Aid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Application List: Creating An Application (For Users With HA Access)

Application → **List** → **Create Application**

1. Click the Create Application link located on the **Application List** page. The **Create Application** page will appear.
2. Select the appropriate select view from the *Select View* dropdown menu.

Note: The next steps will be dependent upon the selection made in the Select View dropdown menu.

Note: If the user has selected the FO HA DD Application or TARC HA DD Application from the Select View dropdown menu *on the Application List page, the SAC Processing Office needs to be selected from the Select View dropdown menu on the Create New Application page. If the user selected the SAC DD Application from the Select View dropdown menu on the Application page, the user must select a HA from the Select View dropdown menu on the Create New Application page.*

- If the FO HA DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *HUB*, *Field Office*, and *Field Office HA* from the dropdown menus.
- If the TARC HA DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *TARC*, and *TARC HA* from the dropdown menus.
- If the SAC DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office* from the dropdown menu.

Application: Creating An Application (continued)

Application → List → Create Application

3. Select the appropriate application type from the *Application Type* dropdown menu.
4. Select the appropriate primary contact's name from the *Primary Contact's Name* dropdown menu.
5. Click the **Create** button to create a new application and return to the Application List or **Cancel** button to return to the **Applications List** page

Application: Entering An Application (For Users With HUD Access)

Application → **List** → **Enter Application**

1. Click the <u>Enter Application</u> link located on the **Application List** page. The **Enter Application** page will appear.
2. Select the appropriate select view from the *Select View* dropdown menu.

Note: The next steps will be dependent upon the selection made in the Select View dropdown menu.

Note: If the user has selected the FO HA DD Application or TARC HA DD Application from the Select View dropdown menu *on the Application List page, the SAC Processing Office needs to be selected from the Select View dropdown menu on the Create New Application page. If the user selected the SAC DD Application from the Select View dropdown menu on the Application page, the user must select a HA from the Select View dropdown menu on the Create New Application page.*

- If the FO HA DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *HUB*, *Field Office*, and *Field Office HA* from the dropdown menus.
- If the TARC HA DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *TARC*, and *TARC HA* from the dropdown menus.
- If the SAC DD Application is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office* from the dropdown menu.

Application: Entering An Application (continued)

Application → **List** → **Enter Application**

3. Select the appropriate application type from the *Application Type* dropdown menu.
4. Select the appropriate primary contact's name from the *Primary Contact's Name* dropdown menu.
5. Click the **Create** button to create a new application and return to the Application List or **Cancel** button to return to the **Applications List** page

Application: Performing An Application Search

1. Click the Application Search link located on the **Application List** page. The **Application Search List** page will appear.

   Note: The Application Search link will only be seen if the SAC DD Application is selected from the Select View dropdown menu, located on the Application List page.

2. Click inside the appropriate **Search By** radio button.

   Note: Users may enter additional information in the Search By text box to narrow the application search.

3. Click the **Search** button. The table will filter with applications that match the search criteria.

Application: Adding Or Removing A Development

Application → **Form HUD 52860** → **Add/New Development**

1. Click the Add/New Development link on the **Application Index** page. The **Add/New Development** page will appear.
2. Select the appropriate available development from the *Available Development* list box.
3. Click the **Greater than Arrow** button to add the selected available development to the *Proposed Development* list box.

   - To remove a proposed development from the *Proposed Development* list box to the *Available Development* list box, click the **Less than Arrow** button.

4. Click the **Save** button to save the information and return to the Application Index or the **Cancel** button to return to the Application Index.

Application: Modifying Application Type

1. Click the <u>Application Type</u> link located on the **Application Index** page. The **Modify Application Type** page will appear.
2. Select the appropriate application type from the *Application Type* dropdown menu.
3. Click the **Save** button to save the information or the **Cancel** button to return to the Application Index.

Note: Changing the application type will update some sections from required to optional and vice-versa.

Application: Uploading Attachments

Application → **Form HUD 52860** → **Supporting Documents**

Note: If the application status of an application is HQ Approved or Inactive, the user can not upload an attachment. Attachments for an HQ Approved or Inactive application can only be downloaded.

1. Click a specific Attach Document link within an application section. The Attach Document link will automatically default to the **Supporting Documents** page for that particular section.
2. Select the appropriate attachment type from the *Attachment Type* dropdown menu.

Note: The Attachment Type dropdown menu will automatically default to the section of the application where the user has clicked the Attach Document link. The user has the option to change the attachment type.

Note: If an attachment type other than a section within a development is selected from the Attachment Type dropdown menu, the Select Development dropdown menu will not be in view for the user to make a selection and the next step will be to enter a description for the attachment.

Note: If the application has just been created and no developments have been selected, the user will only be able to select the following choices from the Application Type dropdown menu: Standard Approval Letter, Approval Letter, Approval Memo, Miscellaneous, and Section 3, Line 2 Board Resolution.

Application: Uploading Attachments (continued)

Application →	**Form HUD 52860** →	**Supporting Documents**

3. Select a development from the *Select Development* dropdown menu.
4. Enter a description for the attachment in the *Enter Description* text box.

Note: The description can not be more than 255 characters.

5. Click the **Browse** button. The File Upload window will appear.
6. Select the appropriate file and click the **Open** button.

Note: A file name can not be more than 50 characters.

7. Click the **Attach** button.

Note: Users can only attach Excel, Text, Word, Bitmap, Microsoft Project, Powerpoint, and Rich Text files to an application.

Note: Attachments for a development will appear in the Development Attachments table. Other attachments will appear in the Application Attachments table.

Application: Uploading Attachments (continued)

Application → **Form HUD 52860** → **Supporting Documents**

- To return to the previous section, click the Return to Previous Section link.
- To download a file, click the **Download** button.

Application: Downloading Attachments

Application → **Supporting Documents** → **Supporting Documents**

1. Click a specific Download link located in the Development Attachments or Application Attachments table on the **Supporting Documents** page.
2. Click the **Save File** button in the Unknown File Type pop-up box. The Save As window will appear.
3. Select a location to save the downloaded file.
4. Click the **Save** button.

Note: If the user has not accessed the Supporting Documents page through a specific Attach Document link, the Return to Application Index link will be in view to return to the Application Index. If the user has clicked on a specific Attach Document link to access the Supporting Documents page, the Return to Previous Section link will be in view to return to the previous section.

- To delete an attachment, click the **Upload/Delete** button.

Application: Deleting Attachments

Application →	Supporting Documents →	Supporting Documents

1. Click the **Upload/Delete** button on the **Supporting Documents** page.
2. Click the Delete link of a specific attachment located in the Development Attachments or Application Attachments table. A pop-up box will appear asking if the user wants to delete the document.
3. Click the **OK** button located in the pop-up box. The selected attachment will be removed from the table.

Application: Submitting An Application

Application → **Submission** → **Application Submission**

1. Review the Summary of Demolition and/or Disposition Activity information located on the **Application Submission** page.
2. Click the <u>View Quality Checklist</u> link to see what information is missing.
3. Click the <u>PHA Certification</u> link. The Special Applications Center (SAC) website will appear.
4. Click the <u>requirement for a new PHA certification</u> link. The PHA Certification will be accessed in Acrobat Reader format.
5. Print and complete the PHA Certificate.
6. Mail or fax the PHA Certificate to:

Special Applications Center
US Department of Housing and Urban Development
77 West Jackson Boulevard
Room 2401
Chicago, IL 60604-3507
Fax: (312) 886-6413

Application: Submitting An Application (continued)

Application → **Submission** → **Application Submission**

7. Click the **Submit** button to submit your application.

Note: Upon the submission of an application, Housing Authorities will not be able to modify the application. Only the processor has edit access for submitted applications.

Application: Reviewing Quality Checklist

Application → **Quality Checklist** → **Quality Checklist**

1. Select the appropriate development number from the *Development Number* dropdown menu located on the **Quality Checklist** page.
2. Click a specific Line Item link in the table.
3. Complete the suggested section.

   Note: Not all the missing fields are required to be completed.

Application Review: Processing Submitted Applications

Application Review → **List** → **Application Review List**

1. Select the appropriate select view from the *Select View* dropdown on the **Application Review List** page.

   Note: The next steps will be dependent upon the selection made in the Select View dropdown menu.

   - If the *FO HA DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *HUB*, *Field Office*, and *Field Office HA* from the dropdown menus.

   - If the *TARC HA DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office, TARC,* and *TARC HA* from the dropdown menus.

   - If the *SAC DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office* from the dropdown menu.

   Note: The SAC DD Application will only be in view for HUD users.

2. Select the appropriate application type from *Application Type* dropdown menu.
3. Select the appropriate processor from the *Processor* dropdown menu.
4. Select the application status from the *Application Status* dropdown menu.

Application Review: Processing Submitted Applications (continued)

Application Review → **List** → **Application Review List**

5. Select the appropriate reviewer from the *Reviewer* dropdown menu.
6. Click the **Retrieve** button. The table will be filtered with applications based on the selections made from the dropdown menus.
7. Click the Application Number link in the Application table to access a particular application or click the Next link located at the bottom of the table to access the next 100 records. Click the Previous link to return to the previous set of records.

   Note: Next steps will depend on whether or not the application has already been assigned a reviewer and processing office. If an application without a reviewer or processing office is selected, the user will be moved to the Application Reviewer page. If an application with a reviewer is selected, the user will be moved to the Application Milestones page.

   - To assign a Processing Office or Reviewer, click the Assign Processor/Reviewer link.

Application Review: Assigning A Reviewer

Application Review → **List** → **Application Reviewer**

1. *Select the appropriate reviewer from the Reviewer dropdown menu located on the* ***Application Reviewer*** *page.*

   Note: In the future, as more processing offices become available, users will have to make a selection from a Processing Office dropdown menu.

2. Click the **Save** button to save the information or the **Cancel** button return to the previous page.

Application Review: Entering Milestone Dates

1. Click the Modify Application Dates link located on the **Application Milestones** page. An editable **Application Milestones** page will appear.
2. Enter the reviewer completion date in the *Reviewer Completion Date* text box or click on the **Calendar** button to select a date.
3. Enter the HQ received date in the *HQ Received Date* text box or click on the **Calendar** button to select a date.
4. Enter the application received date in the *Application Received Date* text box or click on the **Calendar** button to select a date.
5. Enter the processor completion date in the *Processor Completion Date* text box or click on the **Calendar** button to select a date.
6. Enter the HQ approval date in the *HQ Approval Date* text box or click on the **Calendar** button to select a date.
7. Click the **Save** button to save the information or the **Cancel** button to return to the previous page.

Note: When the HQ Approved Date is entered and saved, the application becomes locked and the Unit information will be sent to the Capital Fund sub-module by the Unit Transaction table.

Application Review: Modifying An Application's Status

Application Review → **Active Status** → **Active Status**

1. Click the Modify Active Status link located on the **Active Status** page. An editable **Active Status** page will appear.

   - To inactivate/activate the entire application, click inside the appropriate **Active Indicator** radio button.
   - To inactivate only certain developments within an application, select the appropriate active application development located in the *Active Application Development(s)* list box. Click the **Greater than Arrow** button to move the selected Development(s) to the *Inactive Application Development*(s) list box.
   - To activate only certain developments within an application, select the appropriate active application development located in the *Inactive Application Development(s)* list box. Click the **less than Arrow** button to move the selected Development(s) to the *Active Application Development*(s) list box.

   Note: Terminated developments can not be made activated once made inactive.

   Note: Inactivation of an application or development removes all proposed inventory (Section 5) from the application. To view previously proposed inventory, click the View Inactive Units link in Section 5.

   Note: Once actual information has been entered for an application, an application can not be activated.

2. Click the **Save** button.

Comments: Viewing Comments

1. Select the appropriate select view from the *Select View* dropdown menu located on the **View Comments** page.

   Note: The next steps will be dependent upon the selection made in the Select View dropdown menu.

   - If the *FO HA DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office*, *HUB*, *Field Office*, and *Field Office HA* from the dropdown menus.
   - If the *TARC HA DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office, TARC,* and *TARC HA* from the dropdown menus.
   - If the *SAC DD Application* is selected from the *Select View* dropdown menu, the user must select the appropriate *HQ Office* from the dropdown menu.

   Note: The SAC DD Application will only be in view for HUD users.

2. Read comments for the specific application.

   - To modify a comment, click the <u>Modify Comment</u> link.

Comments: Viewing Comments (continued)

Comments → **List** → **View Comments**

Note: The original creator of the comment has 72 hours to modify a comment.

- To delete a comment, click the Delete Comment link.

Note: The original creator of the comment only has 72 hours to delete a comment

Comments: Creating Comments

1. Click the <u>Create Comment</u> link located on the **View Comments** page. The **Create Comments** page will be accessed.
2. Enter comments in the *Enter Comment* text box.
3. Click the **Save** button to save the information or the **Cancel** button to return to the previous page. Users will be returned to the previous page to view comments.